



2000 ARIZONA

**★UNIT COORDINATOR
★KEY WORKER**

TRAINING GUIDE

GIVING TO CFC IS EASY!

**Y ...CHOOSE THE AMOUNT
O ...DECIDE THE MEANS
U ...SELECT THE RECIPIENT**



INTRODUCTION

Congratulations on being selected as a Campaign Coordinator, Unit Coordinator, or Keyworker for this year's Combined Federal Campaign. The information in this guide will help you conduct a successful campaign.

You were selected because of your ability to get the job done, and to do it well! The Combined Federal Campaign offers you the opportunity to demonstrate your organizational skills while helping to build a stronger, healthier and more responsive community.

If you have any questions after reading this guide and receiving your training, please contact any one of the people listed below. Your campaign committee and local coordinators stand ready to assist you at any time.

YOUR PRIMARY POINTS OF CONTACT FOR ASSISTANCE	
NAME/PHONE	
NAME/PHONE	
NAME/PHONE	
NAME/PHONE	

PCFO STAFF * 520-903-9000 - PHONE 520-903-9002 - FAX	BOB PALMER ELAINE ASADDULLAH	*EXT 235 *EXT 255
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E-Mail: bpalmer@uwtucson.theriver.com
elainea@uwtucson.theriver.com

**THANK YOU FOR BEING AN IMPORTANT PART OF THIS YEAR'S LOCAL
COMBINED FEDERAL CAMPAIGN!**

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STEPS FOR A SUCCESSFUL CAMPAIGN

STEP 1 - KNOW THE PROGRAM:

You're doing it right now! This guide will familiarize you with all of the campaign materials and procedures designed specifically for this year's CFC.

STEP 2 - INVOLVEMENT:

The Campaign Coordinator (CC) or Unit Coordinator (UC) will contact Keyworkers to discuss campaign plans and schedules. In an organizational meeting, the CC or UC will outline items that are specific to your unit's/organization's local campaign including:

- a. *Last year's results.*
- b. *This year's goal and plan for action.*
- c. *This year's overall campaign timetable.*

STEP 3 - DEVELOP STRATEGY:

Every unit/organization within the local Combined Federal Campaign (CFC) is unique. The following campaign items should be tailored to fit your organization's requirement:

- a. **CAMPAIGN TIME TABLE.** September 18, 2000 - October 31, 2000. Although the campaign schedule runs 6 weeks, you may wish to run a shorter campaign, lasting only 2 to 3 weeks because of the size or mission of your organization. Whatever your decision, past experience has taught us that the first 3 weeks of the campaign are the moneymakers. Weeks 1 through 3 are the most effective and efficient due to interest levels of both your workers and the contributors, **SO PLAN ACCORDINGLY!**
- b. **COMMANDER/AGENCY HEAD SUPPORT.** Campaign Coordinators and Unit Coordinators should meet with the Commander/Agency Head prior to campaign start dates to secure his/her support in:
 - (1) Endorsing the payroll deduction method of giving.
 - (2) Allowing all employees to participate in a 30-minute campaign rally. At this rally you, as the CC or UC would explain the CFC, present the brief campaign video, and answer any questions. This "campaign meeting" could be accomplished as part of weekly staff meeting, Commander's Call, or any other similar preplanned function.
 - (3) Recruiting an adequate number of quality Keyworkers to personally solicit all employees. Keyworkers should be well-respected employees. (Recommend 1 Keyworker for each 20 employees.)
- c. **CAMPAIGN COORDINATORS AND UNIT COORDINATORS.** Ensure that all employees are assigned to a specific Keyworker and sufficient Keyworkers are trained to contact all personnel in your organization.
- d. **CAMPAIGN RALLY.** If your work schedule, demographics, and geographics allow, stage a campaign rally and begin solicitation immediately afterwards. Pledge cards and all other campaign materials should be distributed to the Keyworkers prior to the campaign rally so that pledges can be solicited and made immediately, while interest and enthusiasm are still high.
- e. **CONTACTS.**
 - (1) **Campaign Coordinators and Unit Coordinators.** Keep in contact with your Keyworkers. Communicate with them on **at least** a weekly basis. A happy well-informed Keyworker is a productive Keyworker.
 - (2) **Donors.** Make sure Keyworkers contact 100 percent of your potential donors. People can't and won't participate if they don't know about or understand the campaign. **PEOPLE WON'T GIVE IF THEY ARE NOT ASKED!**
- f. **REPORTING.** Establish a turn-in schedule for completed pledge cards from your Keyworkers. A daily schedule is best, but if geographic separation, or work schedules do not permit this, at least keep informed of campaign status by weekly telephone reports and turn-in Keyworker envelopes.

STEP 4 - FOLLOW THROUGH:

Regardless of your job in this year's campaign, Campaign Coordinator, Unit Coordinator, or Keyworker, you are a vital link in the success of this campaign. Your enthusiasm, dedication, and conscientious efforts are the keys to success for your organizational campaign and our overall purpose: **to meet the health, welfare, and social needs of the individuals in your organization and throughout Arizona.**

SOLICITATION METHODS

There are two types of solicitation methods that have proven effective in past campaigns, **one-to-one solicitation**, and **group solicitation**. Each method has advantages and disadvantages. The method, or combination of methods you use for your solicitation will depend on your organization's structure, personnel, and Commander/Agency Head's wishes.

1. GROUP SOLICITATION:

In a group solicitation, executives and employees are notified in advance of a group meeting at which they will be asked for their contributions to the CFC. After hearing the CFC information and seeing the campaign film, everyone attending is asked to make a contribution using the CFC pledge card provided. Solicitation takes place prior to the conclusion of the meeting. Pledge cards are collected as people leave the meeting whenever possible.

Benefits of Group Solicitation

- ★ Presents CFC story uniformly to the entire work force.
- ★ Flexible method and can accommodate work schedule of entire organization.
- ★ Shortens the total campaign period.
- ★ Reduces the number of keyworkers needed.
- ★ Removes prospective contributors from the distractions of the work area.
- ★ Especially effective in a highly cohesive, group-oriented organization.

Disadvantages of Group Solicitation

- ★ Requires one-to-one follow-up with those not returning pledge cards who attended group presentation.
- ★ Requires one-to-one solicitation of those who did not attend the group presentation.

Six Steps to Successful Group Solicitation

1. Set the dates and times for your group solicitations and determines which employees are to attend. (Plan schedule according to workers' schedule, i.e. swings, mids, etc.)
2. Distribute pledge cards and campaign brochures at the presentation. Have leadership show support of CFC at presentation. Show campaign film and have co-workers give personal testimony. Explain the giving guideline.
3. Ask for a gift at the guideline or ask for an increase above last year's gift. The biggest reason for not giving is not being asked to give.
4. Answer any questions or concerns. People are always more generous when they understand why they are giving. Thank all participants--presenters as well as employees. Collect completed pledge cards.
5. Follow-up one-to-one with those not returning pledge cards that attended the presentations. Say **"Thank You"** for time and listening.
6. Ensure 100 percent of the employees are offered the opportunity to contribute. Solicit those not attending presentation and say **"Thank You"** for time and listening.

2. ONE-TO-ONE SOLICITATION:

This can be a very effective approach because each employee is asked to contribute by a fellow worker. It allows contributors time to ask questions and hear, first hand, about community needs and services that are available. Successful one-to-one solicitation requires 100 percent contact with all personnel by well-trained, knowledgeable keyworkers who are skilled in asking for a pledge.

Benefits of One-To-One Solicitation

- ★ Allow solicitors to tailor CFC message to individual employees.
- ★ Educates contributor about the CFC.
- ★ Can sometimes help an employee since the solicitor can refer him/her to an agency to help with a problem.
- ★ Gives solicitor an opportunity to ask for an increased contribution over last year.
- ★ Gives solicitor an opportunity to deal with a non-contributors objections.

Disadvantages of One-To-One Solicitation

- ★ Requires 1 keyworker for every 10-20 employees in a large, single-location organization. If the organization is spread out over many different buildings or locations, more keyworkers are required.
- ★ Takes a longer campaign period and requires more organization.
- ★ Is sometimes difficult for a keyworker to approach fellow employees and ask for a contribution.

Six Steps to Successful One-To-One Solicitation

1. If you have shift workers, have keyworkers assigned to each shift. Ensure 100 percent of the employees are offered the opportunity to contribute. Introduce self, make opening comment, and establish rapport with the employee.
2. Once a level of comfort is established, share your information about CFC. Explain giving guideline, how the guideline was established, and how it is used.
3. Ask for a gift at the guideline or ask for an increase above last year's gift. The biggest reason for not giving is not being asked to give.
4. Answer any questions or concerns. People are always more generous when they understand why they are giving.
5. Have employee fill out pledge card at this time and collect the pledge card.
6. Regardless of your success, say "**Thank You**" for their time and for listening.

3. EMPLOYEE RALLY:

The key to any campaign is an **Employee Rally**. It is the one medium that allows you to deliver a consistent message of needs and services to all employees. The rally is a natural lead-in to solicitation.

4. SUGGESTED AGENDA FOR EMPLOYEE RALLY: (20 minutes)

- a. Campaign Coordinator or Unit Coordinator presides
 - (1) Distribute pledge cards as they enter room if Group Solicitation
 - (2) Welcome
 - (3) Remarks endorsing the Combined Federal Campaign
 - (4) Introduce Commander/Agency Head
- b. Remarks by Commander or Agency Head
 - (1) Personal endorsement
 - (2) Organization's goal
 - (3) Encourage Pacesetter/payroll deduction giving
- c. UC/KW or CFC representative
 - (1) Brief presentation by agency speaker
 - (2) Show video
 - (3) Questions/Answers
- d. Other endorsements or testimonials - this can be volunteers or recipients within your command/agency
- e. CC or UC closing comments
 - (1) Repeat the need for Pacesetter givers
 - (2) Describe Pacesetter and Double Pacesetter Incentives and the Leadership Award
 - (3) Explain advantages to using payroll deduction
- f. UC/KW or CFC representative
 - (1) One-to-One Solicitation
 - (2) Group Solicitation
 - a. Explain how to fill out pledge cards
 - b. Ask employees to complete pledge cards and return them as they leave
 - c. **Thank Employees!**

EDUCATE & PUBLICIZE

EDUCATE:

Your co-workers will give more generously if they are well informed about the CFC. Your communications plan should include these key elements:

- a. Develop strategy for raising employee awareness of the campaign and how CFC dollars are working in the community throughout the year.
- b. Plan kickoff and special events.
- c. Plan for and design communications materials if necessary.
- d. Report campaign progress to employees.
- e. Develop and conduct a **"Thank You"** program.

PUBLICIZE:

Utilize all avenues of communications, including:

a. TOURS, SPEAKERS, AND FILMS

(1) The best way to learn about the vital services supported by the CFC is to see them in action. CCs and UCs can help organize a tour that meets the unit's interest, time, and location requirements.

(2) We encourage inviting a speaker from a human service agency and/or human service recipients to your rallies.

(3) Use the video to catch the audience's attention and educate them about the Combined Federal Campaign.

(4) To schedule a speaker, tour, or film contact your Campaign Coordinator or CFC staff person.

b. POSTERS

Use bulletin boards to post announcements about tours and rallies. Display the CFC campaign poster and the traditional thermometer status/progress poster in a prominent place.

c. PUBLICATIONS

(1) If the organization has a newsletter, newspaper, or magazine, work with the editor to publicize the campaign. This is an excellent forum for keeping employees aware of campaign status and special activities.

(2) If the organization does not have a formal newsletter, consider creating one for the campaign. It can be as simple as a memo with news about the campaign progress and examples of how CFC contributions help. Reproducible logos are available.

d. STAFF MEETINGS

Consider reserving 10 minutes during weekly staff meetings to advise senior personnel of campaign progress. A short briefing, with slides that show the organization's progress keeps the CFC in the foreground of management's mind.

QUESTIONS AND CONCERNS

*****NOTE: The following responses should be used to learn and understand how to respond to commonly raised objections. The responses below should not be read back but should help you in formulating your own response in your own words.**

"I feel like I'm being pressured to give to the Combined Federal Campaign."

No one wants to be pressured into giving. That's why the Combined Federal Campaign has come out with firm policy statements against it. Forcing someone to give by threat is not a good way to convince people to help others. In fact, pressure defeats the very idea of voluntary giving. The CFC brochure tells you what your rights are if you feel you're being pressured.

People usually give because they understand the critical needs of people in the community, and because they feel the CFC is one of the best ways to help people in need. That's why I'm here--- to help you learn more about the CFC and to answer any questions you might have so that you can make your decisions based on an understanding of the needs. Really, that's the most logical and meaningful basis for giving, isn't it?

"The CFC giving guideline is too high (or) nobody is going to tell me what to give."

The guideline is just that--a guide. Many people ask what others in the community are giving, and the guideline is a way of sharing a standard for giving used by many. Payroll deduction spreads your gift over a year, and it can help provide funding for many agencies.

"I work for a living. I pay my own way. I'm not going to use these services, why should I support them?"

It's possible that you may never use CFC services, however, some people give because they want to maintain the services in case they do need them, like disaster assistance or home health care for an elderly relative, or youth development programs. A number of people give because there are persons in our community who cannot pay their own way...who really cannot help themselves as much as they would like...an abused child, a handicapped youngster, an elderly invalid, the mentally ill. They need help...service...so that they can learn to help themselves. Others simply give to ensure that the help is there if they ever need it.

"Why do some agencies charge fees?"

CFC funded services are used by all kinds of people---not as a charity, but as an aid to everyday living. The funds raised by the campaign go far to assure that no one in need will be deprived. People who can afford to pay, do so; others pay what they can afford.

"Do CFC agencies have other income?"

Yes. Most agencies have developed additional income sources such as foundation grants, government contracts, membership enrollment programs, special events, and service fees based on an individual's ability to pay. It is important to remember that funding from the CFC goes directly to providing services for people in need.

"How do I know the agencies meet the CFC guidelines?"

Your Local Federal Coordinating Committee (LFCC) reviews each application and approves all of the agencies which meet the federal requirements for the CFC.

"Does my money go as handouts to people who refuse to help themselves?"

No. One of the advantages of giving to CFC is the assurance to you, the giver, that your money

"Are CFC agencies just for the poor?"

Member agency services are aimed at helping all people, no matter what their income level. Perhaps you, a member of your family, or one of your neighbors or co-workers has benefited from services provided with CFC funding. The CFC funds agencies that provide day care to children of working parents, agencies handling adoption of normal and hard-to-place children receive funds from the CFC, Boys' and Girls' Club, Boy Scouts, Girl Scouts, YMCA & YWCA, speech and hearing services, senior citizens' centers, sheltered workshops, and many, many more....

"Why have a Combined Federal Campaign?"

The single, annual fund-raising drive, which helps to provide a multitude of services, is the most efficient and economical method yet devised. A single drive including all agencies also limits the workplace disruptions. It provides the federal employee the benefit of being able to contribute to the charity(s) of their choice through payroll deduction, making it easy to support their favorite cause. It works so well because volunteers can combine their resources for one appeal instead of many individual drives. Contributors, too, have the opportunity to see their human service dollars go the furthest to do the most good, helping to support many agencies through one gift.

"I don't need to give because my spouse gives where he/she works."

I'm glad to hear that your husband (wife) supports the CFC. But as an individual, your gift is important also. You see, the CFC proposes that we give to the suggested levels of our total income. When your spouse gives his (her) fair share, he (she) is giving based on his (her) individual salary. We are asking that you do the same, as an individual, by making a contribution based on your salary.

"Why isn't my favorite agency in the CFC?"

CFC maintains an open door policy with respect to an agency applying for admission. Any agency meeting the requirements established by the Office of Personnel Management and applying can participate.

"I cannot afford to raise my gift to CFC; there isn't enough money."

We are all fighting the problems of the cost of living, and it does not get easier. But think, if we feel the pinch, what must it be for someone less fortunate who needs help. Please give whatever you can.

"My taxes are already too high. That should take care of all these kinds of problems."

Government dollars are not growing for "people problems". In fact they are decreasing at an alarming rate. Many agencies are having trouble just getting previously contracted reimbursements for those in need. People who were once helped by government agencies now require the services of the private sector--those agencies funded by CFC.

"There is a CFC agency I don't like. I will have nothing to do with CFC because of this."

We respect your right to have this opinion. Remember, though, that a wide variety of services are performed by CFC agencies throughout this community, our nation, and the world. Not giving hurts those agencies you like. **Designate your contribution to the agency(ies) you want to help and none of your contribution will go to the agencies you don't like.**

CAMPAIGN COORDINATOR RESPONSIBILITIES

POSITION DESCRIPTION: CAMPAIGN COORDINATOR

Support CFC activities based on responsibilities and agencies assigned. Attend training. Assist in overall planning and conducting campaign, report preparation, and recognition planning. Participate in campaign kickoff and activities. Publicly support campaign and encourage participation. Conduct all aspects of campaign with assigned agencies in accordance with training guidelines. Review collected pledge forms and reports for completeness and correctness. Prepare weekly reports. Ensure campaigns are completed in accordance with published time frame. Identify outstanding agencies, unit coordinators, and keyworkers for recognition. Attend CFC recognition activities.

- The Campaign Coordinator is responsible for the overall coordination, education, planning, scheduling, and supervision of the campaign for their assigned commands/agencies.
- ★ The Campaign Coordinator is the key focal point for information and guidance to the Unit Coordinators and Keyworkers. They should provide information and status to management and to employees.
- ★ The Campaign Coordinator should be aware of the status of all unit campaigns under him/her. To do this he/she should audit completed envelopes and check against the campaign report.
- ★ In the absence of an assigned Campaign Coordinator, a CFC staff person is available to perform some of these duties.
- ★ Setting schedules and planning activities are integral to a successful campaign.